Wyoming
Forever West™

2010 Overnight Visitor Profile Research – Full Year Report

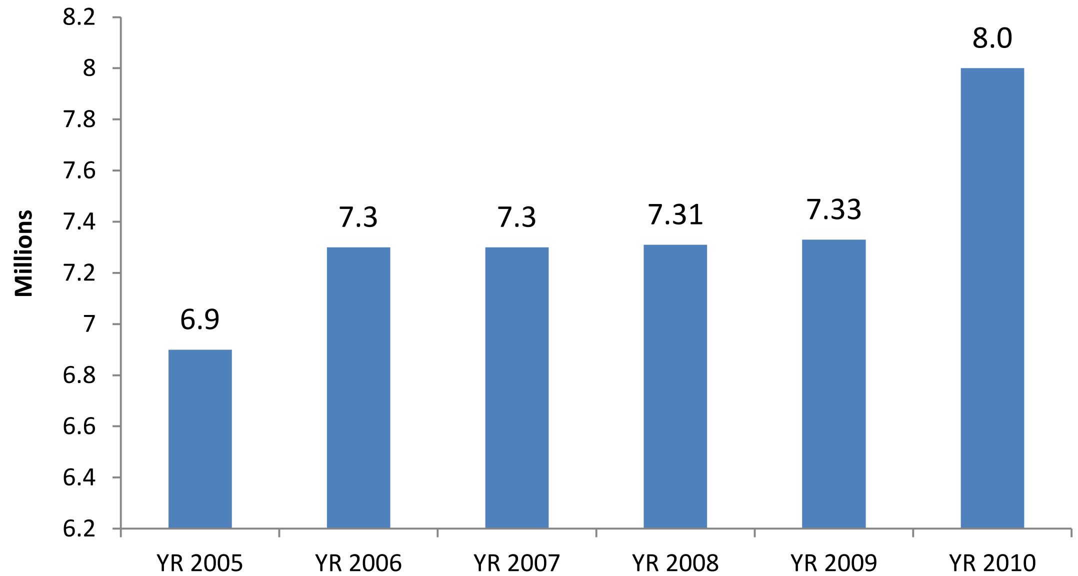
Prepared by Strategic Marketing & Research, Inc.

Background & Methodology

This year, the Visitor Profile research focuses on overnight visitors to Wyoming.

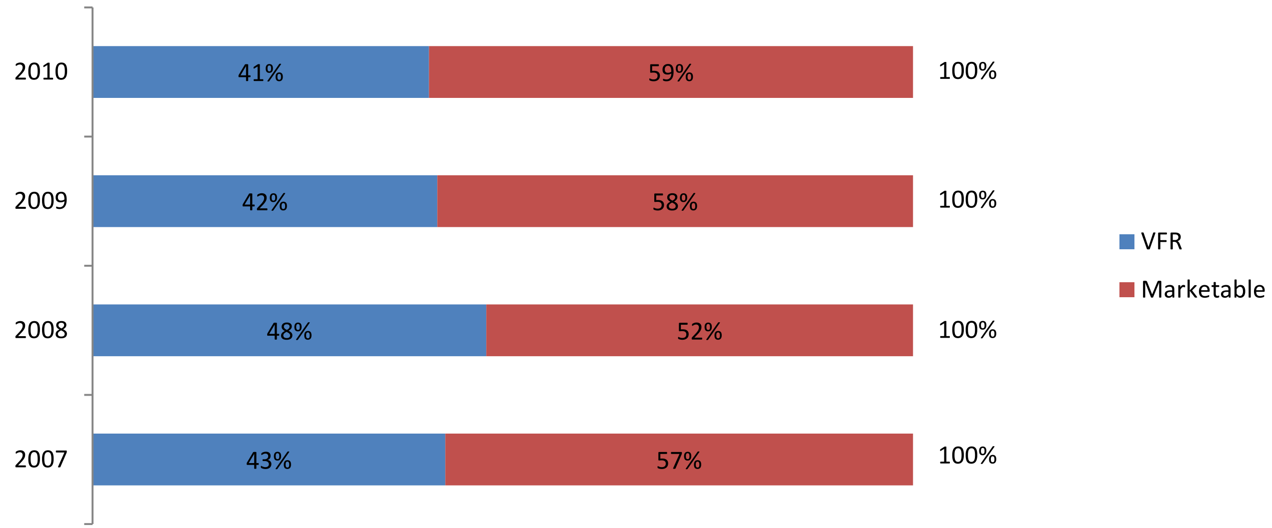
- The goals of the research are:
  - Track information on visitors and trips to Wyoming, including mode of travel, accommodations, attractions and sites visited, duration of travel, and expenditures;
  - Explore where visitors come from, where they go in the state, and what they do while visiting;
  - Identify key motivators for visitation; and
  - Provide information that will assist in marketing efforts
- An online survey was conducted among a national audience to determine incidence of travel and to gather information on visitors and their trips. The focus was on overnight trips only. For 2010, a total of 23,651 surveys were conducted. There were 527 households that reported travel to Wyoming, with some reporting multiple trips. Overall data on 655 trips to Wyoming was gathered.
- Surveying was conducted throughout the year and completed in January 2011. This year more surveying was conducted after the summer season to provide an overview of travel to that point. Thus there have already been mid-year and end of summer reports on the data.

Overnight Visitors



- There was a substantial increase in overnight leisure visitors this year – up from 7.33 million to 8.0 million. This represents a 10% increase in visitors – although this is overnight leisure visitors only.
- Leisure travel was beginning a recovery this year, and Wyoming was a beneficiary of this trend.

Trip Types



- Wyoming saw an increase in marketable trips last year, and this continued during 2010. This suggests that the growth in travel is linked to the state's marketing and advertising efforts.
- Since the goal for Wyoming Tourism is trying to influence trips to the state, the remainder of the report will focus on the findings among people who took marketable trips, although some data relating to all overnight trips will be provided.

New Visitors

- While many of the visitors to Wyoming are repeat visitors, a key to growth will be attracting "new" visitors.
- This year 39% of the visitors had not visited in the past 5 years. During 2007, when the economy was strong, Wyoming attracted more new visitors. This has been harder with a weak economy, when consumers are less willing to "take a chance" with their vacations.
- But with almost 40% of the visitors being new, the state is increasing its visitors base and creating the foundation for additional growth.

New Visitors	2007	2008	2009	2010
All Overnight Trips	39%	30%	35%	34%
Marketable Trips	46%	38%	41%	39%

Visitor Origin

- Patterns of visitor origin were similar to past years, with Colorado, Wyoming and Utah generating the most visitors
- There were three new states that showed up with some prominence –Iowa, Missouri, & Minnesota

State	2007	2008	2009	2010
Colorado	16.0%	16.2%	14.3%	16.0%
Wyoming	8.6%	8.8%	8.9%	8.3%
Utah	7.7%	9.9%	5.9%	8.0%
California	5.5%	6.8%	12.6%	5.4%
Texas	3.7%	4.5%	5.2%	5.1%
Idaho	4.7%	4.9%	5.7%	4.6%
Montana	4.7%	4.8%	4.6%	4.6%
Nebraska	3.5%	2.1%	2.9%	4.1%

State	2010
Colorado	16.0%
Wyoming	8.3%
Utah	8.0%
California	5.4%
Texas	5.1%
Idaho	4.6%
Montana	4.6%
Nebraska	4.1%
Iowa	3.2%
Florida	3.1%
Missouri	3.0%
Minnesota	2.8%
New York	2.8%
Washington	2.2%
Arizona	2.2%
Illinois	1.8%
Total	77.2%

Planning Time Frame

- Over the past several years, research has shown that the time frame for trip planning has shortened This year 56% of the people report planning their trip within 2 months (slightly fewer than the 58% last year). It seems that the planning time frame might have stabilized, but generally it is quite short.
- Part of the shorter time frame is that people are waiting longer to finalize their plans – hoping for a better deal. As prices begin to return to "normal," this trend might begin to reverse. For Wyoming Tourism, a key is to realize that people are thinking about trips and researching destinations before they are making final decisions. Advertising should be on air in time to ensure that Wyoming is part of the consideration set.

Time Frame	2007	2008	2009	2010
Less than 1 month	24%	34%	33%	39%
At least 1 month, but less than 2 months	17%	19%	25%	18%
At least 2 months, but less than 3 months	17%	15%	11%	12%
At least 3 months, but less than 6 months	26%	15%	18%	14%
6 months or more	16%	18%	13%	17%

Information Planning Sources

	2007*	2008*	2009*	2010*
Used Internet	56%	63%	77%	76%
Talked to friends & family	21%	25%	27%	32%
Contacted individual attraction / event for information	10%	16%	10%	18%
None	16%	22%	13%	10%
Called 800 # to request info	10%	7%	4%	4%
Contacted individual chamber of commerce for information	12%	9%	4%	8%
Other	12%	8%	7%	7%

* Marketable trips

- Usage of the Internet to find travel information continues to be strong (76% this year).
- Friends and family continue to be a popular source, and more people are contacting the individual attraction/event.
- The web is obviously a key source, and Wyoming Tourism needs to make sure that its information is available on key websites, as well as ensuring that its website meets consumer needs.

Destination of Trip

- Many visitors to Wyoming include other states as part of their trips, but about half say that Wyoming was their main destination. More people noted that Wyoming was their main destination this year, compared to the past few. This is a positive finding and suggests that the state is creating a stronger image among potential travelers.
- The other states that are included are the nearby and border states.

Destination of Trip	2007	2008	2009	2010
Wyoming was my main destination	42.1%	50.3%	49.4%	52.3%
Headed somewhere else, but included Wyoming	14.6%	20.8%	25.4%	18.0%
One of several places I decided to visit on this trip	43.7%	28.9%	25.2%	29.7%

Other States Visited on Trip

State	%
Montana	33%
Colorado	27%
Utah	23%
South Dakota	23%
Idaho	23%
Nebraska	14%
Nevada	14%
Arizona	11%
Washington	11%
Iowa	10%
New Mexico	8%

Mode of Transportation

- As in past years, the majority of Wyoming visitors drove. In fact, the percentage of drivers increased from previous years.
- This may be a cost-saving measure, as people are still looking for ways to reduce their leisure travel spending.

Mode of Transportation	2007	2008	2009	2010
Drove via car, van, truck or SUV	71%	77%	75%	87%
Flew/airplane	20%	15%	21%	9%
Drove via RV	7%	6%	5%	6%
Bus or motor coach trip	2%	5%	0%	2%
Motorcycle	1%	3%	0%	1%
Other	0%	1%	0%	0%

Trip & Party Specifics for Marketable Trips

- The average trip length was impacted negatively in 2009 with the economic conditions, but it rebounded somewhat this year. The increase was driven by longer summer trips. Trips during the first part of the year were shorter, suggesting that there is a trend toward longer trips and they should continue to lengthen.
- Summer trips are different all around – they are longer, include more people, and are more likely to include children.

Trip Specifics	2007	2008	2009	2010 Summer	2010 Total
Average duration of trips	3.0	3.1	2.0	3.3	2.6
# People in travel party	3.9	3.7	4.2	4.7	3.2
% With kids on trip	40%	28%	40%	42%	25%
Children under 18 in travel party	0.6	0.6	0.8	0.8	.55

Trip Destinations for Marketable Trips

- The top destinations within Wyoming remain generally the same, including:
  - Yellowstone
  - Grand Teton
  - Jackson Hole
  - Cheyenne
- Visitors report an average of 3-4 different destinations for their trips.

Destination	2009	2010
Yellowstone National Park	47%	50%
Jackson Hole	33%	38%
Grand Teton National Park	36%	38%
Cheyenne	18%	29%
Laramie	10%	21%
Casper	14%	20%
Cody	13%	19%
Devils Tower National Monument	13%	18%
Sheridan	7%	16%
Snake River	13%	15%
Rock Springs/Green River	7%	11%
Big Horn Scenic Byway	10%	11%
Gillette	6%	11%
Big Horn Mountains	9%	10%
Buffalo Bill Historical Center	11%	9%
Thermopolis	6%	7%
Snowy Range Mountains	5%	5%

Activities & Motivations among Marketable Trips

- The key activities that motivate people to choose Wyoming are similar to what we have seen in past research – national parks, scenery and natural experiences.
- Overall, visitors report an average of 3.5 activities during their trips, although the average among summer visitors was around 5.

All 2010 Trips	Participate	Motivate
Visiting a national park	49%	40%
Scenic drive	57%	27%
Wildlife watching	35%	14%
Camping	18%	11%
Hiking or backpacking	33%	10%
Visiting historical sites	33%	10%
Visiting a state park	27%	5%
Visiting hot springs	18%	5%
Fishing	8%	4%
Shopping	28%	4%
Attending a rodeo	7%	4%
Snow skiing or snowboarding	3%	3%
Visiting museums	24%	3%
Bird watching	10%	3%
Sightseeing tour	17%	3%
Snowmobiling	3%	2%
Attending a festival or fair	5%	1%

Summer Trips	Participate	Motivate
Visiting a national park	56%	43%
Scenic drive	67%	30%
Wildlife watching	44%	16%
Camping	25%	16%
Visiting historical sites	38%	13%
Hiking or backpacking	43%	11%
Boating	8%	6%
Fishing	10%	6%
Attending a rodeo	8%	5%
Visiting hot springs	22%	5%

- The activities that are popular and that motivate travel are similar during the summer, although some are more prevalent, such as camping and boating.

Activity Changes

When the activities during 2010 are compared to 2009, most activities enjoyed an increase.

Specifically, more people took scenic drives, visited hot springs and enjoyed wildlife viewing.

There were slight declines in some areas, but they are not significant.

Overall, visitors report participating in about the same number of activities this year, compared to 2009. (3.5 on average)

2010 activities	2010	Change
Scenic drive	57%	10%
Visiting hot springs	18%	7%
Wildlife watching	35%	7%
Sightseeing tour	17%	5%
Shopping	28%	4%
Visiting historical sites	33%	2%
Hiking or backpacking	33%	2%
Attending a rodeo	7%	2%
Bird watching	10%	2%
Camping	18%	1%
Snowmobiling	3%	1%
Fishing	8%	0%
Snow skiing or snowboarding	3%	-1%
Visiting a national park	49%	-1%
Visiting museums	24%	-1%
Attending a festival or fair	5%	-3%

Trip Expenditures for Marketable Trips

- While the number of visitors increased, the average trip spending was actually down compared to past years. In part, this is because so many deals and discounts are available – and people are taking more time to find these deals.
- The data also show that trip spending actually increased during the year, with spending on the summer trips being higher. But low spending in the first half of the year depressed the totals for 2010. With the trend toward higher spending, 2011 should be positive.

Expenditures for…	2007	2008	2009	2010 Summer	2010 Total
Lodging	$260	$371	$302	$390	$330
Meals/Food/Groceries	$154	$192	$207	$201	$173
Entertainment	$101	$88	$111	$85	$61
Activities	$86	$75	$63	$62	$46
Shopping	$254	$194	$128	$99	$101
Transportation	$202	$207	$146	$236	$182
Other	$97	$76	$44	$20	$21
Total	**$1,154**	**$1,203**	**$1,004**	**$1,093**	**$914**

Trip Satisfaction

- Trip satisfaction remains similar to last year, although the percentage that rates the trip as "excellent" remains lower than what was seen in 2007 and 2008. The good news remains that almost all respondents rated their experience in a positive way.

Overall Experience	2007	2008	2009	2010
Excellent	54.4%	57.2%	35.9%	37.0%
Very Good	29.6%	31.0%	43.1%	40.7%
Good	12.6%	8.6%	21.0%	19.5%
Fair	1.7%	2.4%	0%	2.5%
Poor	1.7%	0.9%	0%	0.3%

Trip Satisfaction

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- This year the survey also asked visitors to indicate whether their expectations regarding their trip to Wyoming were met. The responses are quite positive, and in almost every case Wyoming at least meets expectations.
- Summer visitors were slightly less likely to say that their expectations were exceeded; this is likely because they have higher expectations for their big summer trips.
- Activities and places are more likely than lodging to exceed expectations.

Expectations - 2010 Summer	Lodging	Activities	Places
Exceeded	17.5%	38.1%	31.7%
Met	77.8%	61.9%	66.7%
Not Met	4.8%	0.0%	1.6%

Expectations - 2010 Total	Lodging	Activities	Places
Exceeded	22.8%	40.2%	35.3%
Met	73.4%	53.9%	62.1%
Not Met	3.8%	1.4%	2.6%

Recommending the State

- The survey also explored visitors' willingness to recommend Wyoming as a place to visit. The good news is that nearly three-quarters of those who visited indicated that they recommended Wyoming to their friends or relatives.
- At the same time, people who visited Colorado or Montana were more likely to recommend these states to their friends, relatives, or co-workers.
- Wyoming gained ground in this measure from mid-year to the end of the year, due to the reactions of summer visitors. Efforts to mobilize past visitors as promoters of the state could help spread the word and establish the brand.

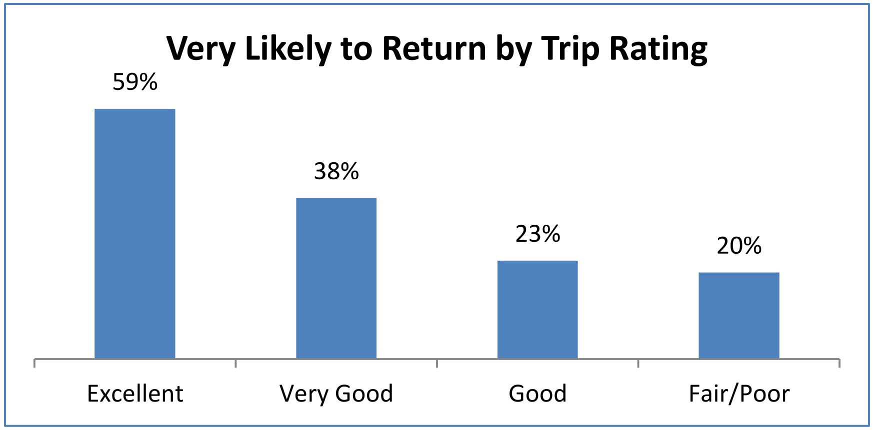
State	Recommended
Colorado	80%
Montana	80%
Washington	75%
Wyoming	**72%**
South Dakota	70%
Oregon	70%
Nevada	68%
New Mexico	67%
Utah	62%
Oklahoma	60%
Texas	57%
Idaho	55%
Kansas	34%

Likelihood to Visit in Next Year

- Perhaps one of the most positive findings is that there is an increase in the percentage of Wyoming visitors who indicate that they are very likely to come again in the next year. This suggests the state could see continued growth.

Likelihood	2007	2008	2009	2010
Very Likely	28%	33%	26%	42%
Somewhat Likely	41%	33%	57%	28%
Not Very Likely	31%	34%	17%	30%

- Having a good experience in the state helps promote interest, and 59% of those who indicated their trip was "excellent" are "very likely" to return.



Visitor Demographics

- The people who visited Wyoming this year are very similar demographically to past years.
- The major difference is household income – which is higher again this year. This suggests that some of those with lower income levels are choosing not to travel, or not to visit Wyoming. This is likely to change in the future as the economy continues to recover.

	2007	2008	2009	2010
Married	65.7%	62.4%	65.7%	65.4%
Not married	34.3%	37.6%	34.3%	34.6%
High school or less	6.4%	16.4%	2.7%	5.5%
Some college or tech. school	30.9%	40.1%	21.1%	23.1%
College graduate	42.5%	32.4%	50.5%	44.1%
Post-graduate degree	20.3%	11.1%	25.7%	27.3%
People in household	2.6	2.8	2.7	2.7
Income	$71,955	$65,012	$67,429	$79,578
Age	50	46	40	46